SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

July 25, 2024

Save an Existing Report through a Dashboard

The EPM Data Warehouse offers many existing reports so that you do not need to create new ones from scratch. After you access an existing report, you can customize it and save it.

Find existing reports from the Catalog, a dashboard, or Favorites.

- **Catalog**. The catalog is where the folders, reports, and dashboards reside. It has a folder structure.
- **Dashboard.** A dashboard is a customized collection of reports that are presented as tabbed sheets. These tabs allow an individual or agency to develop and present reports that are accessible in one place.
- **Favorites**. The Favorites dropdown list displays any reports that you marked as a favorite. This tab is located on the top menu of every page.

IMPORTANT! You can save an existing report from the Catalog or Favorites as well as a dashboard. Once you find the existing report from the Catalog or Favorites, follow the same steps outlines here.

There are several dashboards available to most users depending upon assigned roles and security. If you do not have security access to the Subject Area for a report, you cannot see the report on the dashboard.

1. In general, most EPM Data Warehouse users can find shared dashboards and reports in the _Statewide and Agency Report Exchange folders from the Dashboards menu.
2. Some agencies created their own dashboards. To find these agency-specific dashboards, open the Dashboard menu, look under the agency-specific folders to see what is available to you.
3. You can create your own My Dashboard.

Most users of the EPM Data Warehouse do not have administrative roles and permissions to save reports in shared dashboards and folders. You will need to save reports in My Folders.

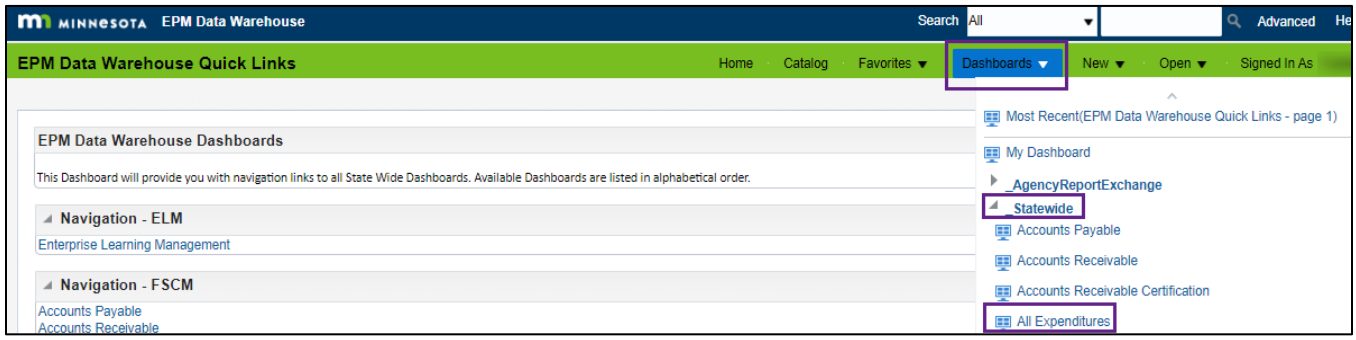
Reports from the _State-wide shared dashboard are a good place they were created based on agency reporting needs. This Quick Reference Guide lists the steps to find, make edits, and save an existing report through the State-wide shared dashboard. It also describes how to find it in the Catalog, make edits, refresh data, and re save it.

Step 1: Navigate to the Dashboards menu and find the desired existing report

1. Navigate to the **EPM Data Warehouse**. Open the Dashboards menu and find the desired report.

Navigation Options	Navigation Path
Navigation Collection	Administrative Portal, Data Warehouse, Data Warehouse, Dashboards menu, _Statewide.

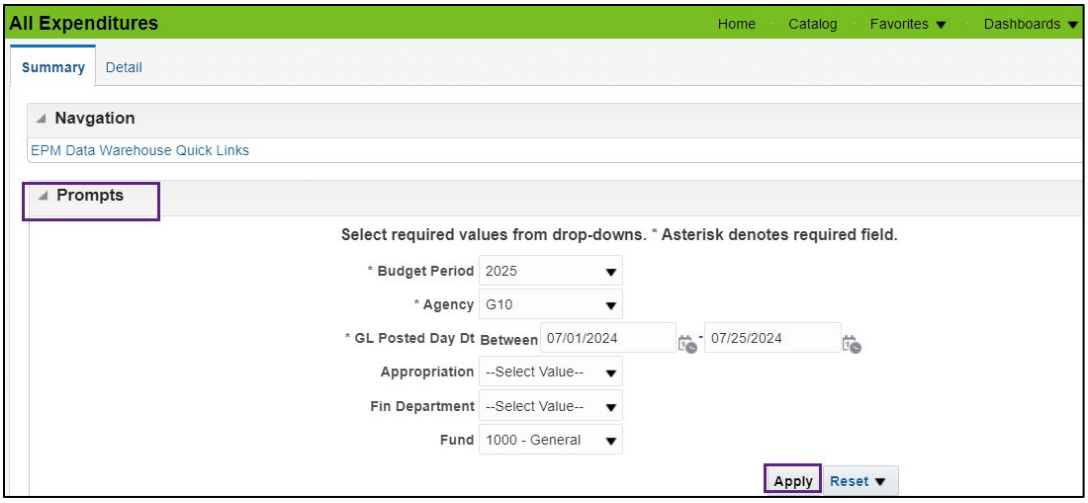
2. Select a dashboard. This guide shows the “All Expenditures” dashboard.



Step 2: Select prompt values, review results, and save it in My Folders

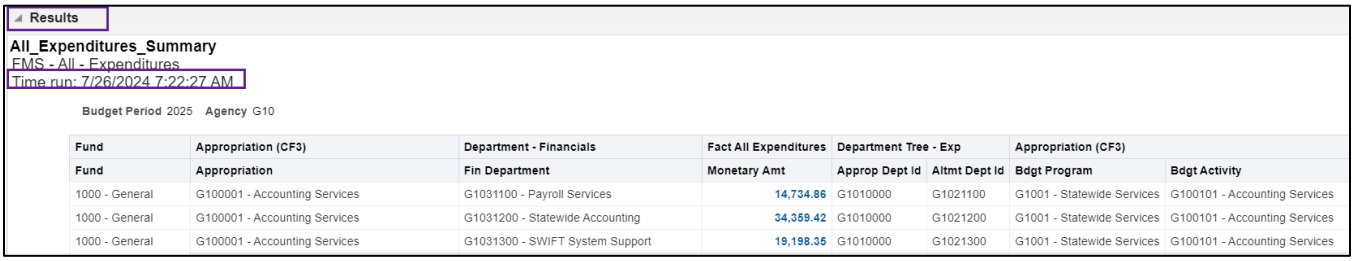
After you select a report, the report page appears. Each shared report has a unique layout depending on the requirements for it.

1. On the **Prompts** section of the report page, update any fields as needed. You must enter values in fields marked with an asterisk (*).
    a. Most dashboards have prompts. A prompt allows you to customize which data is returned in an analysis or report.
    b. Not all existing reports have prompts. If the report does not have prompts, it will automatically run the report results based on any analysis filters in place.
    c. Typically, you’ll see Budget Period and Agency.
    d. If you updated the values in any prompts, select **Apply** to run the report.



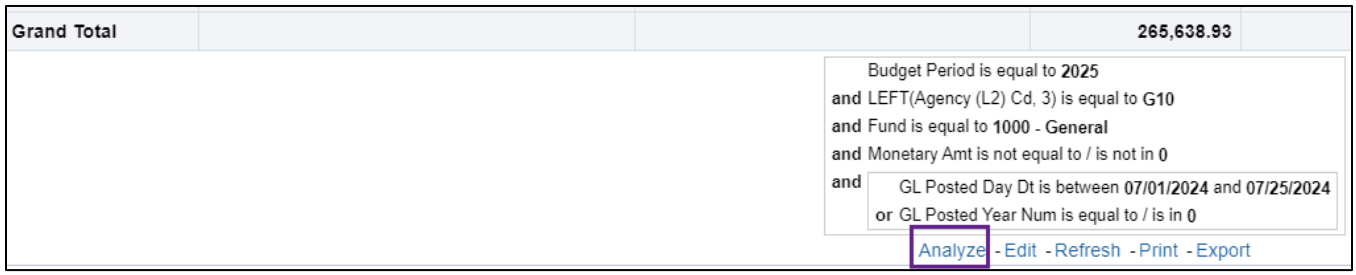
2. Once you select the Apply button, you may see a "Searching…" load message.
    a. If the values you selected in the Prompts section are a large dataset, it may take a while to run this report.
    b. If it doesn't show results in a minute or so, you may need to adjust the prompt values to restrict the data.
    c. You may see a "No Results" message. This occurs if your prompt values were too restrictive and there was no applicable data.
3. The **Filters** section displays the data sets and data values you selected from the Prompts section.

4. The **Results** section shows the report using the selected parameters from the prompts. It shows the name of the report, the date and time it was run, and any parameter such as the Budget Period and Agency.

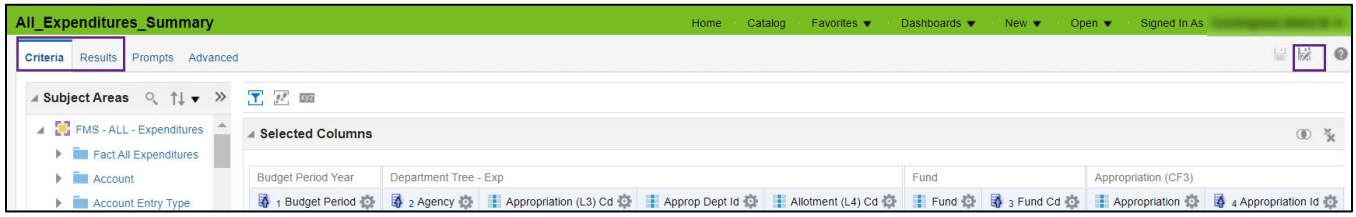


5. Review the results on the Results section.
    a. Update any prompt settings as needed. Select the **Apply** button to update the results.

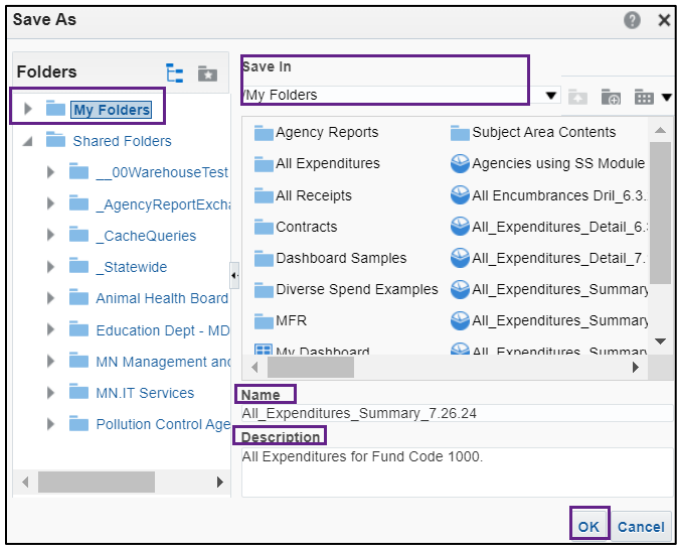
b. When you are ready to save the report and keep the prompt values, go to the bottom of the report page. Select the **Analyze** link. If you select the **Edit** link, it will not save the prompt values and you'll have to enter them again.



6. The EPM Data Warehouse displays the report in the **Analysis Editor** page.
   a. To keep your report prompts, select the **Save As** icon at the top right of the page.



   b. The Save As window appears. Save it in My Folders or you'll likely get an error.
      i. On the Folders section, select "**My Folders**."
      ii. On the Save in section, enter a name in the **Name** field.
      iii. As an option, add a description of the report in the **Description** field.
      iv. Select **OK**.



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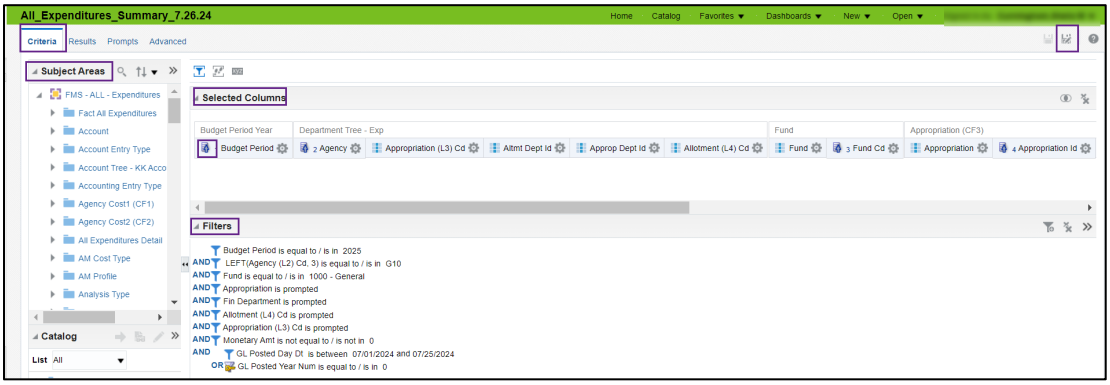
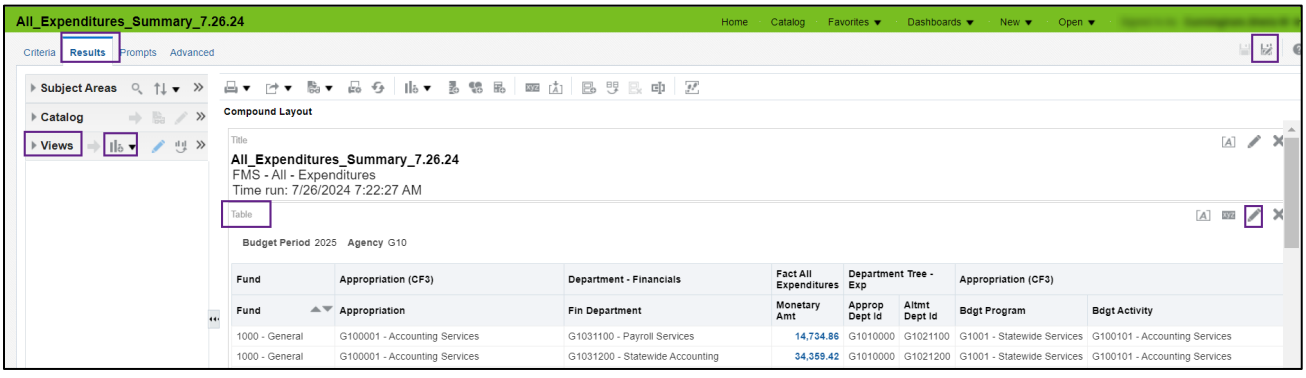
Step 3: Add or edit data elements, update filters, or update the display in the saved report

The updated Analysis Editor page displays with the name you gave to the report.

1. On the **Criteria** tab, you can choose to add or update the data on the report as desired.
    a. You can add new data elements from the Subject Area section to the Selected Columns section.
    b. You can also filter the data values already in the report in the Filters section.
    c. You can create new filters from columns in the Selected Columns section.
    d. After you update the data, select the **Results** tab to verify you have the desired data.
    e. Make sure to save any desired changes using the **Save As** icon at the top right of the tab.
    f. For more information, refer to the Update the Data on an Existing Report Quick Reference Guide.

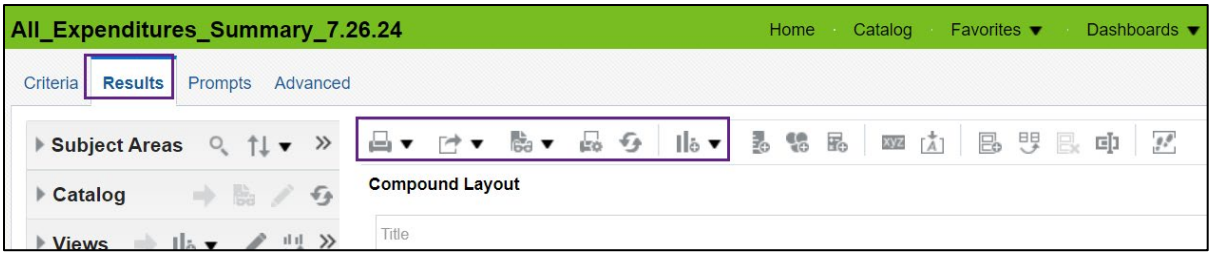


2. On the **Results** tab, you can update the view of the report.
    a. You reformat the columns, put them in in a desired order, and remove them from view using the **Edit View** icon in the Table section.
    b. You can create different views of the data such as a graph or a pivot table from the **Views** section in the left menu.
    c. Review the **Results** tab often to verify that you have the desired view.
    d. Make sure to save any desired changes using the **Save As** icon at the top right of the tab.
    e. For information, refer to the Update the View on an Existing Report Quick Reference Guide.



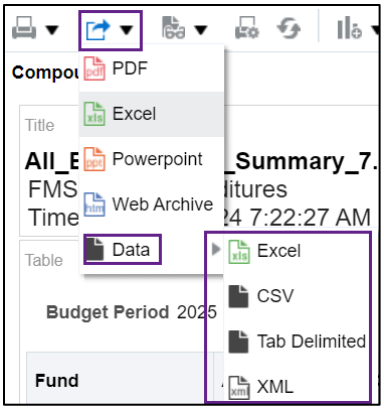
Step 4: Review available icons and take actions on the saved report

1. On the top of the **Compound Layout** section of the Results tab, there are icons that allows you to take actions on the saved report.

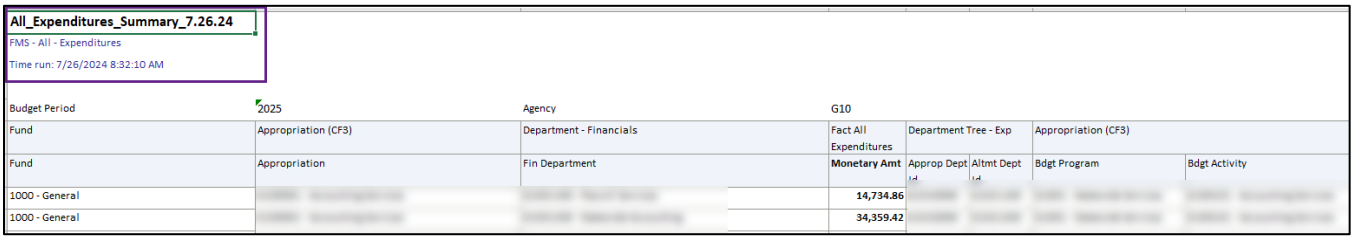


   a. **Print this analysis:** This icon looks like a printer. It allows you to print the report in "Printable PDF" or "Printable HTML" format.
   b. **Export this analysis**: This icon looks like a box with an arrow pointing to the right. It allows you to export the data and save the report to your computer in the following file types: PDF, Excel, PowerPoint, Web Archive, or Data.
      i. Data export options include Excel, CSV, Tab Delimited, and XML. ii.
      ii. If you select Excel, your report will include subtotals.
      iii. If you select Data, your report will include raw data with no subtitles.
   c. **Show how the results will look on a dashboard**: This icon looks like a piece of paper with eyeglasses. It will show how the report appears when displayed in a dashboard. It opens in a separate window.
   d. **Print & export options:** This icon looks like printer with paper. It allows you to set page settings on your printer for printing the report.
   e. **Refresh the results of the current analysis**: This icon looks like two arrows in a circle. It allows you to refresh the data in the current analysis.
   f. **New view**: This icon looks like a piece of paper with a plus sign. It allows you to show the results in other views such as a table, a pivot table, or a graph.
   g. There are other icons for more advanced users to review. Hover above an icon to see its function.

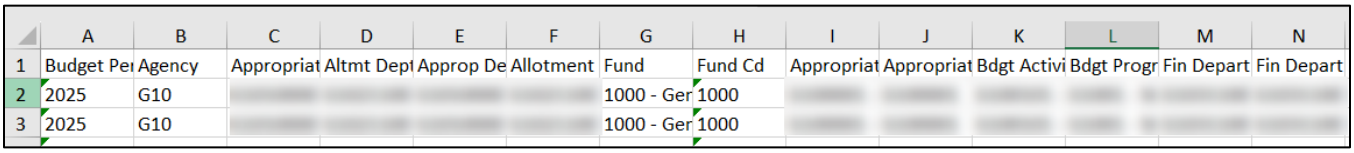
2. As desired, export your report.
   a. Select the **Export this analysis** icon. A drop-down menu appears with the export options.



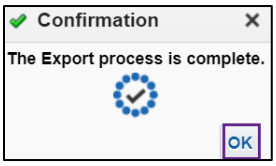
b. If you select PDF, Excel, PowerPoint, or Web Archive, you will get the data in a report with formatting such as the report title and run time. Here's an example of the Excel report.



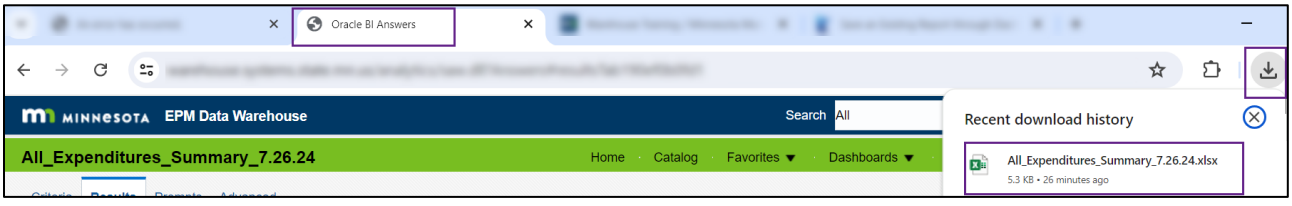
c. If you select "Data" and then select an option, you will get the raw data without any formatting. Here's an example of the Excel data.



3. When the export process is complete, a confirmation window appears. Select **OK**.

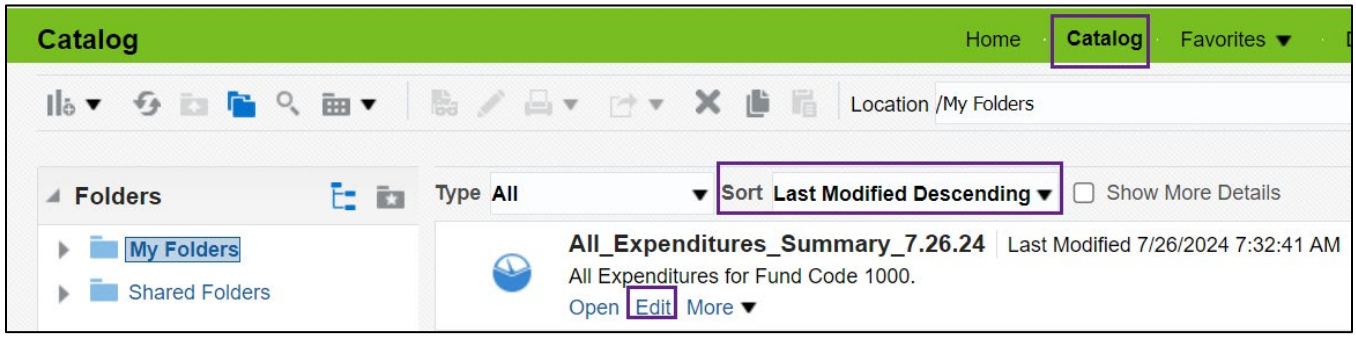


4. The downloaded report appears on your desktop depending on where you get your downloads. For example, it might be on your browser. Select the **Downloads** icon, select the file and save it to your desktop as needed.

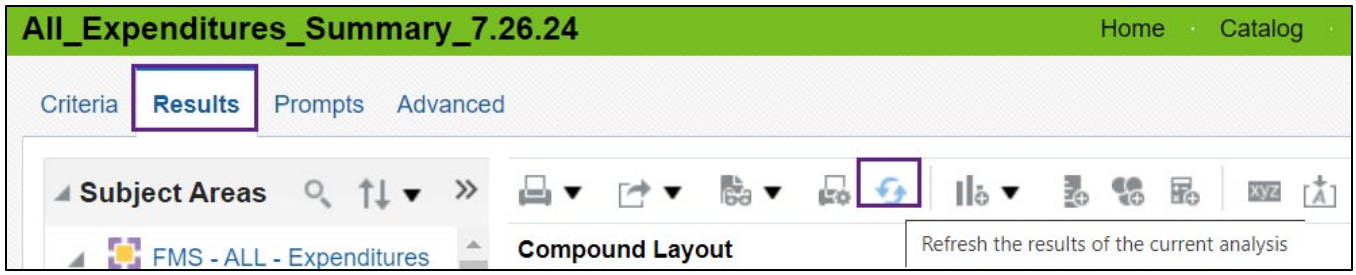


Step 5: Use the Catalog to find, revise, and refresh the report

1. Once you save a report in the EPM Data Warehouse, you can find it in the Catalog in the global header. Select **Catalog**.
    a. **My Folders** typically defaults. You can also open Shared folders if you have permissions to save reports in shared folders.
    b. All your reports in My Folders appear on the right side of the page.
        i. Find the desired report on this section.
        ii. **HINT:** If you select **Sort by Last Modified Descending**, you can find the reports in order that you most recently worked on.
    c. Select the **Edi**t link under your report. **NOTE:** If you select the **Open** link, the report will open but you can't edit it.



2. The EPM Data Warehouse opens the desired report in the Analysis Editor page.
    a. Typically, the report will appear with the most recent data from the last download. Open the **Results** tab to see the report.
        i. If you're concerned about the most recent data, select the **Refresh** icon.
        ii. Be sure to choose the icon above the Compound Layout and not from the Subject Areas. This action reruns your saved report with updated data.



    b. As an option, you can further edit the data or display of your report in the Analysis Editor page. When finished with edits, save the report either as a new report with a new title or an updated report.